

Managing Montana Conference a success



Part of the crowd of 150 that took part in the Managing Montana Conference

Over 150 people gathered on October 5 and 6 at the Gateway Center in Helena for the Second Annual Managing Montana Conference. Focusing on the theme of “Painless, Pro-active Performance Strategies,” the conference provided useful tips and wide-ranging discussion.

The first day kicked off with a panel discussion featuring three members of the Workforce Planning Task Force – Tim Burton (Department of Justice), Tom Livers (Department of Environmental Quality), and Alan Peura (Department of

Revenue). Each shared his department’s efforts at improving hiring practices and performance management.

The remainder of Day One featured keynote speaker Marnie Green, author of *Painless Performance Evaluations* (Pearson Prentice Hall, 2006). Over the course of 3 ½ hours, Ms. Green engaged the group with a lively presentation and several activities geared toward effectively addressing performance issues. In addition, everybody attending received a copy of Ms. Green’s book.

The morning of Day Two encompassed four breakout sessions, each presented twice:

- “Are Your Performance Goals SMAART?” – Marnie Green, Management Education Group
- “Dealing with Challenging Situations” – Julie Benson-Rosston, Collaboration Institute
- “Keeping Your Top Performers in the Game” – Joel Schaffer, Federal Mediation and Conciliation Service
- “Collaborating to Manage Performance in a Unionized Environment” – Gary Hattal, Federal Mediation and Conciliation Service



Presenters Gary Hattal and Joel Schaffer, Federal Mediation and Conciliation Service, visit during the conference reception

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The conference concluded with a panel discussion with the four breakout presenters. They viewed and commented on six video segments of “Performance Management Myth Busters,” produced by State Human Resources and featuring adroit performances by several agency HR officers. The session also included pertinent questions from the audience.

The State Human Resources Division thanks all who attended the conference. In addition, the division acknowledges the efforts of staff members who worked hard to make the conference a success.

AG rules retirement benefits are public information —

In an opinion issued September 16, Attorney General Steve Bullock held, “Retirees of the Teachers’ Retirement System ... do not have individual rights of privacy in the amounts of their retirement benefits that clearly exceed the public’s right to know.”



This question arose from a sequence of events. The State Administration and Veterans’ Affairs Legislative Interim Committee asked the Legislative Audit Division to gather some information. In response to the request, the Audit Division provided lists of the 100 highest benefits paid from TRS and PERS. The lists didn’t identify any retirees.

After the SAVA meeting, a reporter asked TRS for “the names, job titles, [and] government agency for the top 10 TRS retirees.” TRS followed the procedure laid out by the Montana Supreme Court in *Warden v. Board of Pardons and Parole* (1998). Staff sent notices to the top 10 retirees, asking whether they would waive their privacy to release the information. Only one returned a notarized authorization. Two asserted their privacy interest, and seven didn’t respond. TRS deemed lack of response as not waiving privacy.

At the same time, TRS submitted the question to the Attorney General for an opinion. Bullock stated, “Good reason exists to conclude TRS retirees had some expectation of privacy in their retirement benefits.” The response to TRS’s notification showed as much. “In addition, TRS’s own policies may have created an actual expectation of privacy ...” The members’ handbook states, “Most retirement and benefit information is confidential ...”

However, there’s more to the picture, said Bullock. “While TRS members may have had an expectation of privacy, that expectation is only constitutionally protected if society recognizes it as reasonable.” Long-standing precedent in Montana has held that the public has the right to know “public employees’ names, addresses, salary, job titles, merit pay, vacation and sick leave, dates of employment, and hours worked ...” While retirees’ names and benefits are a bit different, Bullock said they’re not all that different.

In addition, the Attorney General cited a California case that said “pension amounts are more comparable to public salaries than to private assets.” (*San Diego County Employees Retirement Association v. Superior Court of San Diego County*, 2011). Bullock found this language “persuasive” in that “retirement benefits are paid largely by public funds and, necessarily, subject to the public’s same interest in understanding how pension funds are calculated and how government is spending taxpayer funds.”

Governor awards employees

Governor Brian Schweitzer and Lt. Governor John Bohlinger bestowed the Governor's Awards for Excellence in Performance on September 19 in Helena. The ceremony at the Great Northern Best Western Hotel was well attended by the 113 recipients, their families, and their co-workers.



"Montana is one of a handful of states with money in the bank, in part, because of our outstanding state employees," Governor Brian Schweitzer said. The employees receiving recognition "continue to do more with less and do it in way that is fiscally responsible and dedicated to serving the people of Montana." The governor acknowledged that these folks represent the entire state workforce that contributes every day to making Montana a great place to live.

The awards went to employees from over 20 different cities and towns across the state. "We have groundskeepers from the Capitol Complex, a teacher from the School for the Deaf and Blind who has taught for over 38 years, Ag employees who are protecting our rivers and lakes from invasive species," said Schweitzer. Recipients also included a Livestock employee who implemented a program to compensate producers due to wolf predation, folks who work in the prison infirmary, a manager who staffs the Jobs for Montana's Graduates program, and over 100 other remarkable state employees.

For a complete list of the award recipients and how they earned them, go to <http://mt.gov/2011GovernorsAwardsforExcellence.pdf>

Leadership Challenge gets underway

The Leadership Challenge, an intense and engaging exploration on "getting extraordinary things done in organizations," is ramping into high gear. Based on the best-selling books of Jim Kouzes and Barry Posner, this training steers through the five practices of leadership:

- Model the Way
- Inspire a Shared Vision
- Challenge the Process
- Enable Others to Act
- Encourage the Heart



Last November, Jane Rhodes and Joe Schopfer of the State Human Resources Division received facilitator training from the authors' institute. Since the beginning of 2011, they have been adapting and presenting the program for Montana state government.

The Professional Development Center inaugurated its three-day program last spring, jointly led by Kathy McNeill and Jane. About that time, Joe was delivering the training for managers in the Department of Environmental Quality. Currently, Joe is working with the State Information and Technology Systems Division. This month, PDC will start two sessions – one for Department of Administration and the other for Department of Revenue.

The most extensive *Leadership Challenge*, however, will come from an initiative of the State Human Resources Division through the State Office of Labor Relations. The division is sponsoring 200 scholarships for “potential leaders” from agencies with collective bargaining agreements. Over the course of this biennium, ten sessions of *The Leadership Challenge* will provide slots for these scholarships.

The division has pro-rated scholarships to the agencies, based on the size of their organized workforce. Agencies will work directly with Ruth Anne Hansen, Greg Martin, and Butch Plowman to schedule their folks into the training. The first of these sessions will take place in November.

PDC to reward regular customers



PDC will start handing out bonus class punch cards around November 1

The Professional Development Center is starting a “punch card” program to reward bureaus who regularly send their employees to PDC training. When a bureau sends at least one employee to five training sessions within a year, the bureau will receive one free enrollment from PDC.

Here’s how it works. Each person attending a workshop will receive a card to fill out with the bureau’s name and the date of that workshop. In later workshops, employees from the bureau can bring the card to have a star punched. When the fourth star is punched, PDC won’t charge the bureau whose employee brought the card to that workshop.

Each bureau will need to keep track of its punch card (or cards). When an employee brings a card from the bureau, he or she won’t receive a new card that day. That employee will just get punched – er, have the card punched.

What if two or more employees from my bureau attend a class?

Each person gets a card. If one of you brings an existing card, it gets one punch, and that person doesn’t get a new card. It boils down to one punch per card per class. The other bureau employees, though, each get a new card.

If I bring two or more “partially punched” cards from my bureau, do I get to combine the punches to qualify for a free class?

Nope. To qualify for a free class, one card has to have the fourth star punched at that class.

What if I forgot to bring the card from my bureau (or wasn’t aware of it)?

Your bureau will have one week after the class to get the card punched. Bring it by the classroom or our office. If we need to confirm that a bureau employee attended, we’ll hang onto the card and send it back after we’ve checked.

Alternative formats ...

The State Human Resources Division will make reasonable accommodations to provide an alternative accessible format of this newsletter. If you need an alternative format, please contact the Division at 406-444-3871 or TDD 406- 444-1421.